# CARES Worker Web: Major Changes (04/26/2005- 01/03/2006)

This document highlights the major changes made to CARES Worker Web since its initial release. These changes have largely resulted from the end-user feedback, suggestions and concerns.

User Interface

Message panel color change (PCR 22138)
Depending on the severity of a particular message, a different color error panel will be displayed. The color will match the most severe message. If there is an error, it will be red. If there is a warning but not error, it will be yellow. If there is only an informational message, it will be green.
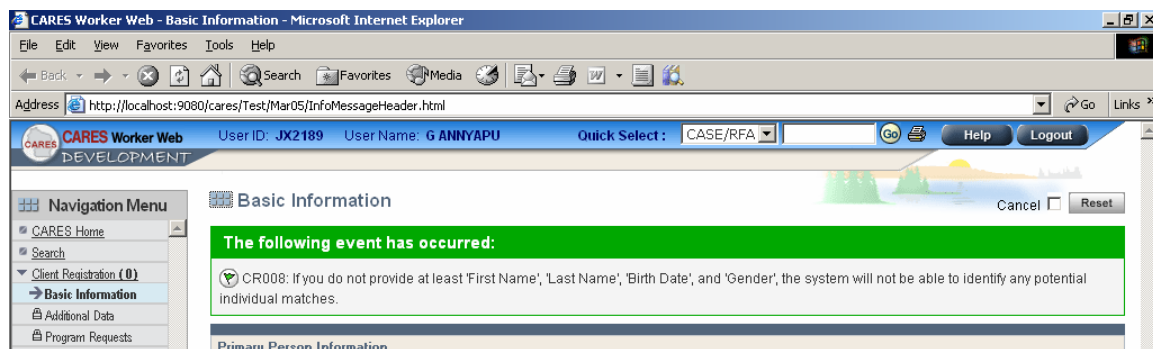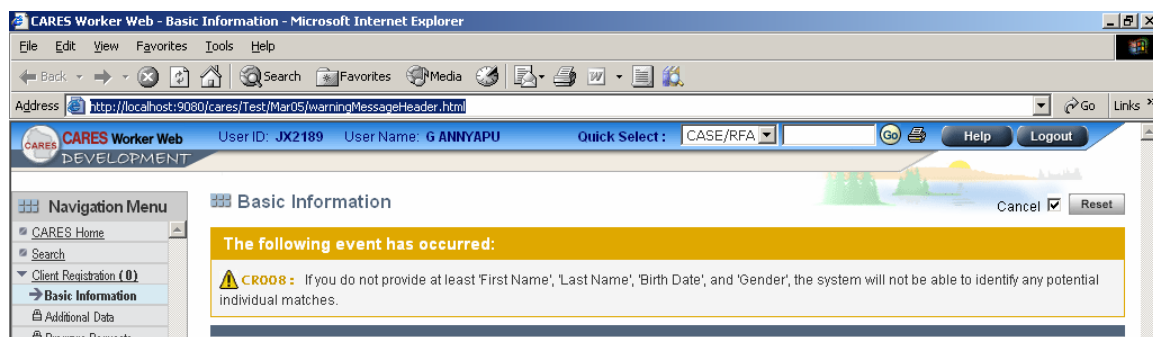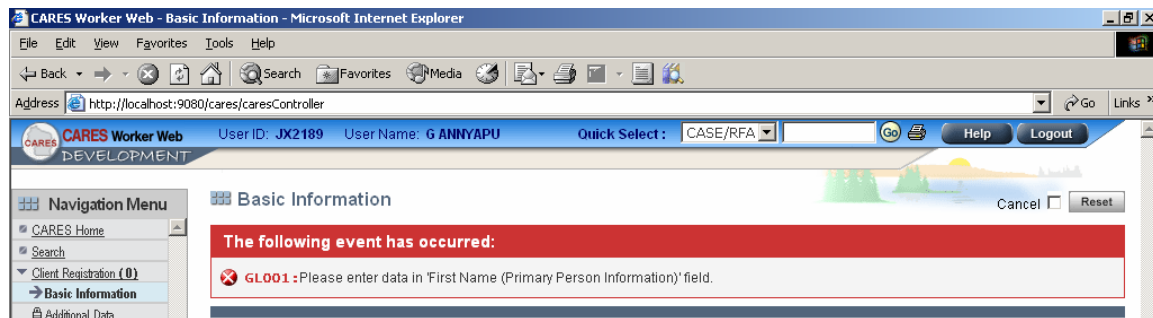
Highlighting field in error (PCR 22510)
When there are data entry errors, the labels for the fields in error will turn red and bold. If multiple fields are involved in an error message, all involved fields will be highlighted. For example, if the message is "If A is entered, B must be entered." In this case, both A and B will be highlighted.

Dynalist fields required markings (PCR 21796):

- If at least one row is required in a dynalist, the arrow will now be shown in red. Otherwise, it will be gray.
- Any field that makes up a dynalist will have its label displayed in italics. Asterisks will no longer be used to identify which fields are required upon clicking Add or Update.

Recently accessed cases/RFA's (PCR 22522)
Display more accessed cases/RFA's on home page. This has been increased by 5 cases to 10 cases based on pilot feedback.

Emphasize distinction between the Training and Production environments (PCR 23885)
Some workers have gotten confused between the training and production environments, and have accidentally entered training cases in Production. This PCR is intended to make this distinction more obvious.

Client Registration

Enhancement Potential Matches to include non-cleared individuals (PCR 22532)
Potential Matches has been changed so that individuals in open RFA's who have not yet been cleared will be included. Therefore, a user could find an RFA that they just created but have not yet turned into a case and have not cleared the PP yet.

Do not default contact date to current date on Additional Data (PCR 22528)
Since this was causing problems and confusion for mail in applications, this date will not longer be defaulted.

Denied status for RFA program requests (PCR 23116)
If no action is taken on an RFA within 30 days of the program filing date, the RFA gets denied for that program. Currently, the program request for that program changes to "No" (not requested). This doesn't let the user know that it was previously requested. There will now be a new status of "Denied" which will be displayed if the system automatically denied a program after 30 days.

Show case on RFA Summary (PCR 23291)
There will be a new field on the RFA Summary called "Associated Case." If an RFA was processed into a case, this will list the case that the RFA has become. There will be a magnifying glass with a link to the case. If the RFA has not yet become a case, it will say "N/A"

Up Front Application Entry

Select Other Household Members Change (PCR 21384)
Individuals previously determined not relevant to the case may not need to be listed on the "Select Other Household Members" page forever. A trash can icon at the end of each row has been added to allow the user to remove such individuals from showing up on this page.

Current Household Members list is moving to top (PCR 22512)

Add ACCESS question to the General Case Information page (PCR 21377)
We currently have a question displayed on the Additional Data page in Client Registration regarding whether the client used the ACCESS Online Screener. A similar question will be added to the General Case Information page. When people or programs are added to a case, the General Case Information page will sometime be presented with the question blanked out so that it can be answered.

Group level program request driver
There are now two new options on the case summary page – "Record new group level program request" and "Process group level program request." This process allows a client registration worker or case worker to make a note on an existing case that a client would like to apply for one or more additional programs. This process is used when a full interactive interview is not possible. This process accomplishes the goals of recording the filing dates in CARES, printing out the application registration to obtain a signature, and performing priority service determination for FoodShare.

Page Level Application Entry

Medical Coverage should show covered individuals even if not in case (PCR 23039)

If all covered individuals have left the case, there are currently no covered individuals listed and a validation is run requiring the user to add data. This change will make sure the covered individual is listed even if they are no longer in the case (the mainframe works this way as well).

Calculate button on the Employment page (PCR 23490)
A new button will be added to the Employment page, which upon clicking will calculate the total amounts and remain on the Employment page. If the user now clicks next button or another button that will perform a save, the system will not display the information message that indicates that totals have been calculated. If the user does not make changes, does not click calculate and clicks next or another button, then the system will display the informational message as is it does currently.

Text changes on Absent Parent page to make it less confusing (PCR 23677)
Text changes to the header sections of the page and the terminology used to display the Absent Parent's required to be entered on the page will be changed. A mockup of the changes was presented to the group on 06/29 and was well received by the group.

Eligibility Access will show indicator of when worker should run eligibility (PCR 22554)
There are certain times when we set an alert for the worker to run eligibility (alert 056). When the conditions have been met to set this alert, we will also show a message on the eligibility access page to indicate that the worker should run eligibility.

General Application Entry

Add looping indicator for when page is made visit again (PCR 22551)
Just like how the demographic pages display a progress bar which indicates "Completed 1 of 5", other looping pages will also display this progress bar when that page is required. This will allow the user to see how many sequences he/she needs to visit.

Summary pages enhancement to list all effective months (PCR 22764)
Another icon (a square magnifying glass) has been added to the lists on the summary pages, which will load a pop-up window with all the effective months for the specified sequence. When the summary page is in history mode, all records will be listed on the pop-up.

Expenses Summary

Dependent Care Obligations/ Payments

Individual	Begin Month	End Month	Last Updated	Delete Reason	Seq	Obligation Amount	Payment Amount	Paid For		
LATONJA - UPDA MELVIN - LOWER 33F PP	01/1999		09/07/2003		4	$70.39	$70.39	TROY MELVIN 9M SON	🔍	🔍
LATONJA - UPDA MELVIN - LOWER 33F PP	01/1999		04/17/2001		3	$60.97	$60.97	TEIA MELVIN 11F DAU	🔍	🔍
LATONJA - UPDA MELVIN - LOWER 33F PP	09/1998		04/17/2001		2	$56.72	$56.72	SABREIA MELVIN - LOWER 12F DAU	🔍	🔍

Support Obligations/ Payments

Individual	Begin Month	End Month	Last Updated	Delete Reason	Seq	Obligation Amount	Payment Amount	Support Type		
LATONJA - UPDA MELVIN - LOWER 33F PP	03/2003		09/07/2003		1	$100.00	$100.00	ATTORNEY'S FEES	🔍	🔍

Medical Expenses

Individual	Begin Month	End Month	Last Updated	Delete Reason	Seq	Expense Type	Service Date	Budgetable Expenses		
LATONJA - UPDA MELVIN - LOWER 33F PP	03/2003		09/07/2003		1	AIR AMBULANCE	01/01/2003	$100.00	🔍	🔍

Expense Summary Details

Dependent Care Obligations/Payments

Summary

Individual: LATONJA - UPDA MELVIN - LOWER 33F PP

Sequence: 4

Details

Begin Month	End Month	Last Updated	Delete Reason	Obligation Amount	Payment Amount	Paid For
01/2000		03/31/2005		$90.39	$70.39	TROY MELVIN 9M SON
01/1999		09/07/2003		$70.39	$70.39	TROY MELVIN 9M SON
09/1998		10/12/1998		$113.52	$113.52	TROY MELVIN 9M SON
01/1997		03/31/2005		$70.39	$70.39	TROY MELVIN 9M SON

Automatically create converse joint asset (PCR 23038):

Currently, when an asset is jointly owned, the user needs to enter it once for each joint owner in the case. The system will be enhanced to automatically create the converse joint asset(s) when a jointly owned asset is added and the joint owner(s) are in the household. The approach for this is as follows:

- User adds a new asset (Liquid, Vehicle, Real Property, Personal Property, Burial, Lump Sum Life Insurance)
- The system validates and saves the entered the information
- For each joint owner listed that is in the case, the system creates a new asset sequence with the same information but the individual and joint owner reversed
- The system displays an informational (green) message for each asset sequence created, such as "A corresponding new asset sequence has been created for joint owner John Smith 35M (sequence 3)."
- The user will be forced to visit the newly created asset records.

User Adds: CARES Worker Web Adds:

```
                              ┌──────────────────────┐
                              │ Individual: Carol    │
                              │ Type: Cash           │
┌──────────────────────┐     │ Amount: $300         │
│ Individual: Mike     │     │                      │
│ Type: Cash           │     │ Joint Owners:        │
│ Amount: $300         │──►  │   Mike               │
│                      │     │   Greg               │
│ Joint Owners:        │     └──────────────────────┘
│   Carol              │              ┌──────────────────────┐
│   Greg               │              │ Individual: Greg     │
└──────────────────────┘              │ Type: Cash           │
                              │───────►│ Amount: $300         │
                                       │                      │
                                       │ Joint Owners:        │
                                       │   Mike               │
                                       │   Carol              │
                                       └──────────────────────┘
```
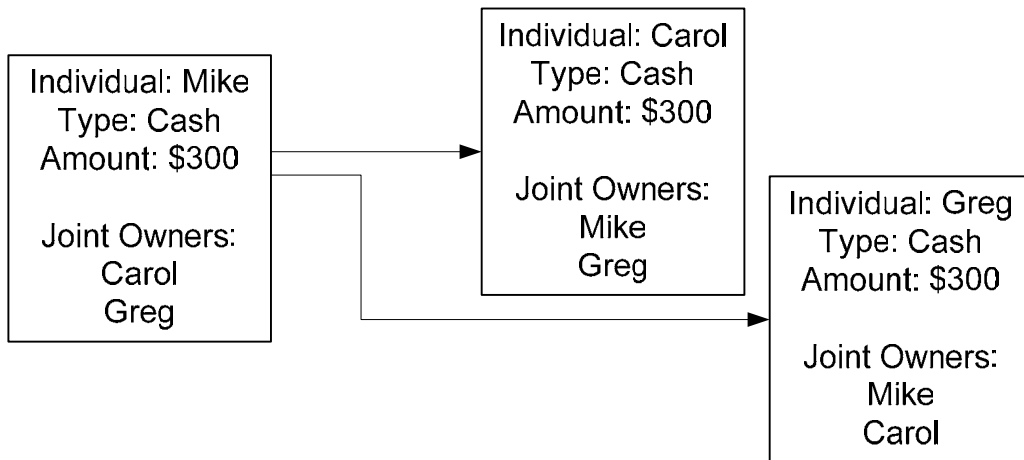
Streamline process for deleting existing individual (PCR 23681)
Currently, if a user wants to delete household members from a case in an intake mode, the user is unable to delete the individuals right away. The user needs to visit the unnecessary pages for those same individuals before they can be deleted. The following approach will be used to streamline the delete process on the Household Members page in any mode:
- o If the individual selected to be deleted on the Household Members page does not have any open eligible AG, the living arrangement will be automatically updated to 15 in the background and the individual will be permanently deleted from the case.
- o If the individual selected to be deleted on the Household Members page does have any open eligible AG, then the living arrangement will also be updated to 15 in the background and the individual will be temporarily deleted from the case. This will allow the user to navigate through the CWW pages without visiting the records for the deleted individual(s). Once the user runs eligibility and confirms, then the individuals that were temporarily deleted, will now be automatically permanently deleted from the case.

Person add enhancement to gatepost scheduling (PCR 23793)
During a person add, users must still visit all financial pages. For example, if the user comes to the Employment gatepost during a person add, the Employment gatepost question may already be Y and protected. Since we do not know if the new person also has employment, we just automatically bring up the detailed Employment page and the user must go through all existing Employment sequences. The following approach will be used to handle this scenario. When adding a brand new person to the case, all questions on the gatepost pages that have been previously selected as 'Y' and that currently show up as protected will now display a drop down with two options (Yes and Add New). If the user selects Add New then the relevant blank pages will be scheduled and the user will not need to go through the existing detail page records.

Don't run validations when AE deleting a record (PCR 22531)
When AE deleting an existing record, the system will no longer run validations.

New Pages

Web version for the Record Six Month Report Actions page (PCR 22675)
This page will list all six month report forms that have been generated for a case and allow workers to enter action code and action date information. This page will be a part of the six month reporting driver. The user can either select a particular case from the Pending Six Month Report

Forms page or type in a known case using quick select, which will navigate the user to the Case Summary page for that case. The worker will then select the six month reporting driver option and on clicking 'Next' will be navigated to the Record Six Month Report Actions page.

Web version for the Employment Verification Past Due page (PCR 22674)
The page will display information at the case level and by default will display a list for cases that have employer verification past due for the worker logged in. If the worker selects a case by clicking on the magnifying glass in the list view, the worker will be navigated to Case Summary page for the corresponding case. The Employment Summary page will be scheduled when there are past due employer verifications for the case.

Develop a web version of the existing AQ Query screens in CARES (PCR 23931)
The following existing query screens in CARES (screens starting with the letters AQ) will be implemented as new pages in the in CARES Worker Web (CWW).

Mainframe screens	CWW pages
Query Case Summary (AQCS)	Confirmed Assistance Group Summary page (combined version AQCS+AQAS)
Assistance Group Summary (AQAS)	
Case Member History (AQCM)	Case Member History page
Assistance Group Eligibility History (AQAE)	Confirmed Assistance Group Eligibility History page
Assistance Group Member History (AQAM)	Confirmed Assistance Group Member History page
Individual Eligibility History (AQIE)	Individual Eligibility History page
Individual Participation History (AQIP)	Individual Participation History page

The Reason Code Description Maintenance screen (CURD) will also be implemented as the Reason Code Search page in CWW. It will be displayed as a popup page from the required query pages and also be available under Worker Tools. Also, the Individual Summary page will be modified to add links that will allow the user to navigate directly to the Individual Eligibility History and Individual Eligibility Participation pages.

Develop a web version of the Asset Assessment (AAAA) screen (PCR 23932)
The Asset Assessment (AA) page will be a new page where the AA logic will be performed. This will require changes to the Driver, Navigation Menu and some of the existing CWW pages such as:
- CR Additional Data page
- CR Complete Request page
- RFA Summary page
- Individual/Case Clearance Results page
- Case Summary page

As part of this implementation we will also review the existing mainframe logic used to calculate the values on the Asset Assessment page and incorporate any changes based on feedback. Also, we will review the existing mainframe PCR's for this functionality (not related to eligibility) and implement fixes if appropriate based on feedback.

Develop a page in CWW to display the Child Support Income Details (PCR 23913)
The Child Support Income page will be implemented only on the CARES Worker Web.
The Unearned Income Summary page will be enhanced to include to summary section displaying the Individual, Last Payment Date and a magnifying glass that will navigate the user to the Child Support Income Details page.

The Child Support Income Details page will be a read only page and display the payment data for the last four weeks in one section and the last three months in another section. This data will be read from a flat file from the data exchange service (KIDS). The totals and averages for these sections will be calculated on load of the page and displayed. The page will also display Individual and Absent Parent data, and allow the user to navigate between individuals in the case receiving payments and view historical data using a record navigator.

Develop a web version of the existing CMCA screen (PCR 24104)
- Caseload Search Criteria page: This page will allow the user to enter the criteria required to load the Caseload Assignment page. The user will the ability to filter cases based various case based criteria and will be have the option to either simply view the cases in the caseload or transfer the cases.
- Caseload Assignment (View Cases) page: This page will display the requested view of the caseload of the user specified on the search page.
- Caseload Assignment (Transfer Cases) page: This page will display the requested view of the caseload of user specified on the search page. The user will have various options to transfer cases or cases and alerts to another user's caseload. The user will have the ability to transfer only selected cases, all cases displayed (based on any criteria applied) and all cases in the caseload.

Develop a web version of the existing ACCT and ACSC screens (PCR 24103)
The ACCT screen and the ACSC tran will be combined into one page in CWW called the Case Transfer page. This page will be accessed through a new option that will be added to the Case Summary page called Transfer case. The case transfer using this page can be initiated by the old or the new county. This page will allow users to transfer a non SeniorCare to a new county. For SeniorCare cases this page will transition the case to a web case and transfer it the new county in a step approach.